

Mineral Industry Surveys

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FLUORSPAR IN THE THIRD QUARTER 1999

Reported consumption of fluorspar was 134,000 metric tons, 29% higher than in the previous quarter and 7% lower than in the third quarter of 1998. Consumption of fluorspar for hydrofluoric acid and aluminum fluoride production was 126,000 tons, 32% higher than in the previous quarter and nearly 8% higher than in the third quarter of 1998. Imports of fluorspar were 107,000 tons, essentially unchanged from the previous quarter but 18% lower than in the third quarter of 1998.

Industry News

The closure of Laporte Minerals' fluorspar operations in the United Kingdom was averted with its sale to Land Regeneration Management Ltd. (LRM). LRM specializes in the regeneration of brownfield industrial lands with a background in mining-related work. The new operation will return to using the name Glebe Mines Ltd., which was the name the operation had prior to its acquisition by Laporte in 1959. The new company will operate as a smaller operation with a greatly reduced labor force and a much reduced production output. Restarting production from the underground mines, Sallet Hole and Milldam, is not in the company's immediate plans (Peter Huxtable, Laporte Minerals,

written commun., 1999).

Plans for the International Fluorspar Conference 2000 have been announced. It will be held in Denver, CO, at the Hyatt Regency Denver Tech Center on March 22-24, 2000. The interim list of topics include papers on industry trends, Chinese production, changes in South Africa, shipping logistics, international metspar markets, and ceramic and merchant markets in North America.

Fluorochemical News

On December 1, AlliedSignal Inc. and Honeywell Inc. announced that they received clearance from the European Commission to complete the merger first announced on June 7 of this year. The companies said they planned to complete the merger after the close of trading on the New York Stock Exchange, marking the historic launch of a new \$24 billion global technology company operating under the Honeywell name. The fluorochemicals business will be part of Honeywell Specialty Chemicals (Honeywell Inc., December 1, 1999, press release, accessed December 7, 1999, at URL <http://www.honeywell.com/>).

TABLE 1
SALIENT FLUORSPAR STATISTICS 1/

(Metric tons, unless otherwise specified)

	1998		1999			
	Third quarter	Fourth quarter	First quarter	Second quarter	Third quarter	Year to date
Imports for consumption	131,000	129,000	150,000	106,000	107,000	362,000
Value per ton, c.i.f. U.S. port, acid grade	\$135	\$123	\$120	\$117	\$132	\$123
Value per ton, c.i.f. U.S. port, metallurgical	\$86	\$89	\$86	\$91	\$88	\$88
Exports	11,900	8,260	20,800	14,000	22,500	57,200
End of quarter stocks: consumer 3/	131,000	134,000	136,000	117,000	105,000	105,000
Fluorspar equivalent of imported hydrofluoric acid 4/	46,100	44,000	47,000	50,400	39,000	136,000
Fluorspar equivalent of imported cryolite	3,720	4,880	3,680	3,100	2,310	9,090
Quarterly reported fluorspar consumption	144,000	141,000	143,000	104,000	134,000	382,000

1/ Data are rounded to three significant digits.

2/ Average value for year-to-date 1999.

3/ Does not include material purchased from the National Defense Stockpile by traders or indirect consumers.

4/ Does not include hydrofluoric acid from foreign trade zone.

TABLE 2
CONSUMPTION OF FLUORSPAR BY END USE AND ASSAY RANGE 1/
(DOMESTIC AND FOREIGN IN THE UNITED STATES)

(Metric tons)

End use or product	Second quarter 1999			Third quarter 1999			1999 Year to date
	More than 97% calcium fluoride	Not more than 97% calcium fluoride	Total	More than 97% calcium fluoride	Not more than 97% calcium fluoride	Total	
Hydrofluoric acid and aluminum fluoride	95,000	318	95,400 r/	126,000	311	126,000	356,000
Basic oxygen furnaces	--	2,710 r/	2,710 r/	--	2,370	2,370	7,100
Electric furnaces	W	2,280	2,280 r/	W	1,820	1,820	7,160
Other uses or products 2/	869 r/	3,130 r/	4,000 r/	902	2,890	3,790	11,400
Total	95,900	8,430 r/	104,000	127,000	7,390	134,000	382,000
Stocks, end of quarter	93,900	22,800 r/	117,000	81,200	23,700	105,000	105,000

r/ Revised. W Withheld to avoid disclosing company proprietary data: included in "Other uses or products."

1/ Data are rounded to three significant digits; may not add to totals shown.

2/ Includes acid grade used in enamel, glass and fiberglass, steel castings, welding rod coatings and data represented by symbol "W."

TABLE 3
U.S. IMPORTS FOR CONSUMPTION OF FLUORSPAR, BY COUNTRY 1/ AND VALUE 2/

(Metric tons, unless otherwise specified)

	1998				1999							
	Third quarter		Fourth quarter		First quarter		Second quarter		Third quarter		Year to date	
	Quantity	Value 3/ (thousands)	Quantity	Value 3/ (thousands)	Quantity	Value 3/ (thousands)	Quantity	Value 3/ (thousands)	Quantity	Value 3/ (thousands)	Quantity	Value 3/ (thousands)
Containing more than 97% calcium fluoride:												
Austria	--	--	--	--	106	\$56	1	\$7	--	--	107	\$63
China 4/	70,300	\$9,650	96,000	\$11,800	104,000	12,300	48,000	5,460	75,700	\$10,200	227,000	27,900
France	210	77	70	28	70	28	18	8	75	31	163	67
Germany	--	--	--	--	41	19	--	--	250	34	291	53
Mexico	1,200	173	515	75	2,170	258	3,340	421	3,120	386	8,640	1,070
Morocco	4,730	693	--	--	--	--	--	--	--	--	--	--
South Africa	45,500	5,860	19,700	2,390	31,400	3,810	28,500	3,410	17,600	2,080	77,500	9,300
United Kingdom	--	--	--	--	4	4	2	4	5	7	11	15
Total	122,000	16,500	116,000	14,300	137,000	16,500	79,900	9,310	96,700	12,700	314,000	38,500
Containing not more than 97% calcium fluoride:												
Canada	21	6	55	15	21	6	39	12	37	11	97	29
China	--	--	--	--	--	--	16,700	1,500	--	--	16,700	1,500
Mexico	9,070	776	12,400	1,100	12,200	1,040	8,900	809	10,200	886	31,300	2,740
Total	9,090	782	12,500	1,120	12,200	1,050	25,700	2,330	10,200	897	48,100	4,270

1/ Imports for consumption include imports of immediate entry, and warehouse withdrawals.

2/ Data are rounded to three significant digits; may not add to totals shown.

3/ C.i.f. at U.S. ports.

4/ Data do not agree with published Bureau of the Census data due to adjustments made by the U.S. Geological Survey.

Source: Bureau of the Census.

TABLE 4
IMPORTS FOR CONSUMPTION OF HYDROFLUORIC ACID 1/

(Metric tons, unless otherwise specified)

	1998				1999							
	Third quarter		Fourth quarter		First quarter		Second quarter		Third quarter		Year to date	
	Quantity	Value 2/ (thousands)	Quantity	Value 2/ (thousands)	Quantity	Value 2/ (thousands)	Quantity	Value 2/ (thousands)	Quantity	Value 2/ (thousands)	Quantity	Value 2/ (thousands)
Canada	9,300	\$7,720	5,970	\$6,810	7,000	\$8,090	6,600	\$7,860	6,840	\$7,980	20,400	\$23,900
China	--	--	--	--	--	--	--	--	17	14	17	14
France	94	103	37	42	92	106	56	57	72	77	220	240
Germany	34	65	30	62	48	100	17	35	38	100	103	235
Japan	245	714	336	965	391	1,230	355	1,050	329	930	1,080	3,210
Mexico	21,000	13,500	22,900	14,600	23,800	22,000	26,500	24,300	18,700	17,300	69,100	63,500
United Kingdom	39	42	19	22	19	20	19	20	--	--	38	40
Total	30,800	22,100	29,300	22,500	31,300	31,500	33,600	33,300	26,000	26,400	90,900	91,200

1/ Data are rounded to three significant digits; may not add to totals shown.

2/ C.i.f. at U.S. ports.

Source: Bureau of the Census.